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Branding instead of product innovation: a study on the brand personalities of the UK's electricity market.

Abstract

This study extends understanding of and demonstrates the importance of corporate branding in the energy sector. We analyse the relationship between branding and consumer switching behaviour among the UK's Big Six electricity providers. Since privatisation companies have competed against each other, but to the consumer they often appear to have very similar product offerings; firms also face criticism from consumer groups regarding confusing and difficult to compare pricing schemes. This study examines the use of corporate branding to enhance differentiation and specifically examines the influence of brand consistency and brand personality on the retention of customers. Consumers, who find it difficult to compare tariffs, may be influenced by more demonstrable factors like branding. We demonstrate the importance of longitudinal brand consistency, as well as the personality dimension *Excitement*, which when communicated strongly has the greatest influence on customer retention levels. This work contributes to branding theory, demonstrating that brand personality does differentiate otherwise homogeneous (and low-contact) services. Managerial implications are presented for brands seeking to improve consumer retention.

Keywords:

Energy sector branding; Energy branding; Brand personality

1. Introduction

Consumer energy markets are complex (Gangale, Mengolini, and Onyeji 2013) and it can be extremely difficult for consumers to directly compare offerings between the main energy providers (Chioveanu and Zhou 2013). It is difficult for customers to accurately compare tariffs and prices with many customers not signed up to the package that is cheapest for them and often unwilling to switch providers (McDermott 2013). Since the UK energy sector's privatisation, marketing and branding have become increasingly important as methods of promotion and differentiation for providers (Hartmann and Ibáñez 2007, Shippee 1999). Energy companies are confronted with the threat of customer defection, as well as having to compete against each other, poaching each other's' customers being the prize (Walsh, Dinnie, and Wiedmann 2006). The complexity of UK energy tariffs and the lack of transparent package comparability have been criticised by the media and government (Richards and White 2014). Energy companies have responded by focusing on corporate marketing and branding in order to attract new consumers, but also to improve existing customer satisfaction (Payne and Frow 1997).

The energy sector provides an ideal landscape for a brand-based approach since energy as a product or service is indistinguishable between providers. We focus on the residential electricity market because it is larger (in terms of the number of customers) than the commercial and industrial energy markets. Commercial and industrial customers also have access to bespoke energy services, whereas residential energy services are more generic, allowing for market-wide comparisons. The anthropomorphising of brands in general aids consumer emotional engagement with services (independent of their technical characteristics) and construction of a brand personality provides a useful heuristic device. The aim of this research, therefore, is using the UK residential energy sector as an example, to test the robustness of brand personality theory upon consumer loyalty. The research questions driving

this research are: (1) does a well-defined and consistently communicated brand personality enhance the brand of energy providers and mitigate homogenisation of their services? And (2) can a more demonstrable brand personality prevent consumers switching to rival providers? To the best of our knowledge this is the first time that market-wide switching data are used in relation to branding research for the UK power market.

2. Privatisation and Branding in the UK Electricity Market

Consumer behaviour research highlights that consumers resist making difficult decisions between products or services which are difficult to compare, opting for comparisons within dimensions which can be more easily compared (Ariely 2009). Consumers are more likely to be influenced by factors that they can easily relate to, for example the energy provider's brand (Hartmann and Ibáñez 2007), and in particular the brand behaviour and personality (Hartmann and Apaolaza-Ibáñez 2012, Clancy and O'Loughlin 2002). A brand personality helps to create a level of intuitive appeal and synergy between a brand and its customers (Plummer 1984).

Although well researched in many areas, such as automobiles (Fetscherin and Toncar 2010), cosmetics (Guthrie, Kim, and Jung 2008), education (Rutter, Roper, and Lettice 2016), fashion (Rageh Ismail and Spinelli 2012), health (Pinto and Yagnik 2016), luxury(Sung et al. 2015), politics (Rutter, Hanretty, and Lettice 2015), sport (Braunstein and Ross 2010) and tourism (Opoku et al. 2007), brand personality research is underdeveloped in the energy sector, despite brand management becoming increasingly important in practice. Existing energy research (e.g. He and Reiner (2015), Kaenzig, Heinzle, and Wüstenhagen (2013) and Müller, Sensfuß, and Wietschel (2007)) has emphasised the importance of price and tariff data, rather than branding strategy, as a means to attract and retain consumers. More recently limited research has emerged on marketing and branding in the energy sector. For example,

Herbes and Ramme (2014) explored the strategic marketing differentiation of renewable power suppliers in Germany. Paladino and Pandit (2012) classified the renewable energy utilities in Australia as service providers and focused on their approach to residential consumer recruitment and retention on renewable energy tariffs. Finally, it has been identified that identity signalling has positive effects in renewable energy demand in the Swedish residential electricity market (Hanimann, Vinterbäck, and Mark-Herbert 2015)

While renewable (or green) energy clearly provides a means of service differentiation, regular power utilities have much less to differentiate on. Power sector branding research has been triggered in the past by the privatisation and liberalisation initiatives that reformed formerly state-owned and controlled utilities to competitive corporations. Early branding campaigns during the mid-90s in Sweden aimed to ease public perception that the electricity firms were bureaucratic and inflexible organisations and only targeted prime customers (Summerton 2004). Trustworthiness as a branding feature has been identified by Ibáñez, Hartmann, and Calvo (2006) as one of the main drivers for customer loyalty in the Spanish residential electricity market. For the same market, Hartmann and Ibáñez (2007) suggest that brand trust is as important as customer satisfaction for customer loyalty.

The UK energy sector is particularly interesting because it was the first liberalised energy market, a precursor to similar moves in many other countries, including the US (Giulietti, Price, and Waterson 2005). Until the 1980s, the UK energy sector was under national control, and its privatisation was (and it could be argued, still is) a controversial political decision (Kay and Thompson 1986, Hammond, Helm, and Thompson 1985). Throughout the 1990s, the UK's energy sector went through a series of consolidations and mergers, which have given rise to the current structure (Leggett 2013), in which the Big Six energy companies account for over 90% of the UK residential market share (BBC 2013a).

The Big Six are British Gas, SSE, E.ON UK, Scottish Power, EDF Energy and npower. The first two companies are the largest in terms of customer base and are British owned (Work, Committee, and Rooney 2009); E.ON UK and npower are owned by German investors (E. ON and RWE respectively), whilst Scottish Power is now controlled by Spanish parent organisation Iberdrola (Leggett 2013). EDF Energy is owned by the French state-controlled EDF, who also own British Energy, making EDF the largest producer of energy within the UK.

The UK's residential energy market claims to have the largest number of consumers to have switched supplier, although there has recently been a steep decline in switching (Bawden 2014). Electricity utilities are frequently part of the political discourse where mainstream political party manifestos feature radical proposals for capping energy prices (Landale 2013, Milligan 2017). Energy utilities do not engage in innovative actions either in production (Zafirakis, Chalvatzis, and Baiocchi 2015) or consumption side (Pothitou, Hanna, and Chalvatzis 2017, 2016) and are often criticised for their tariff policies and underinvestment. The latter makes the UK power market uniquely constrained between low production margins and the necessity for the extensive reforms required to meet strict environmental targets.

2.1 Customer Choice within the Energy Sector

Previous research indicates that energy is perceived as a commodity as providers use price perception as the number one factor to influence a consumer's choice to change provider (Watson, Viney, and Schomaker 2002, Rowlands, Parker, and Scott 2004, Goett, Hudson, and Train 2000). However, given the complexity of tariffs and lack of transparent comparability (Bonk 2012, Rommel and Meyerhoff 2009), other factors such as loyalty and brand perception have become increasingly important (García-Acebrón, Vázquez-Casielles, and

Iglesias 2010, Hartmann and Ibáñez 2007). Research by Hartmann and Ibáñez (2007) also suggests that brand trust and associations (for example: innovation and environmental commitment) affect consumer perception and subsequent loyalty, beyond satisfaction or even switching cost.

The success of price comparison websites (PCWs) increases the need for brand related action to avoid a company being labelled as a commodity. PCWs are a useful way for consumers to easily compare and contrast energy tariffs and fourteen PCWs account for 90% of consumer switching activity in the UK. However, the number of customers switching between electricity providers has been falling steadily since 2008, and reached its lowest level in the second quarter of 2013 (BBC 2013b). Typically this has been explained as inertia, as consumers find it difficult to compare over 900 tariffs (McDermott 2013). However, another interpretation could be that the increased branding activities and differentiated brand personalities of the energy providers is increasing consumer loyalty and thus reducing switching behaviour, which we will test in this research.

2.2 Corporate Branding and the Defence against Commoditization

Balmer (2013) suggests that our understanding of brands has now progressed to a corporate brand orientation, whereby the corporate brand acts as the cornerstone, indeed "the centripetal force – that informs and guides the organisation, especially in relation to its core philosophy and culture" (p.724). As an example, Brei and Böhm (2014), discuss the interesting case of Volvic Water that through its campaign to provide 10 litres of drinking water in Africa for every 1 litre sold in western countries turned what was a commodity product into a pioneering corporate brand, ready to address the major issues facing the world. In such ways corporate brands have become more relevant to peoples' lives as consumers themselves have become more demanding of brands (Roper and Fill 2012). This is

synonymous with the rise of the corporate brand in recent years where the company itself becomes the brand, rather than an individual product or service. With this change has come the need for greater transparency from the brand, and as cited above, greater responsibility (Gyrd-Jones, Helm, and Munk 2013). In addition to these factors, Ind and Bjerke (2007) also cite complexity as an important criterion of the corporate brand; that is it can be responsible to multiple stakeholders in many countries and regions.

Lekakis (2012) considers the complexity and politicization of corporate branding specifically within the efforts to brand the otherwise commodified products that come under the "Fair Trade" label. Corporate branding has also helped to provide a recognizable banner around which an industry can group and assume a greater power e.g. the Marlborough wine region in New Zealand.

Our paper considers the success of corporate branding and specifically brand personality in transforming a commodity market. In looking at commodity branding historically, Wengrow et al. (2008) discusses the development of the packaged goods industry. We now recognize fast moving consumer goods as the well-established classic brands, with a history and heritage created by decades of marketing activity. What may once have been seen as commodities have long been differentiated by branding including such basics as bread or cereal. Corporate branding can be utilized to help further delineate that which the consumer still finds difficult to distinguish, e.g. the provision of consumer electricity.

It is argued that many businesses are under attack from a new wave of commoditization (Holmes 2016) with the advent of facilities such as price comparison sites reducing many areas such as insurance and of course energy, into commodities whereby price is seen as the key differentiator. Mingione (2015), in a meta-analysis of corporate branding

literature acknowledges the often confused nature of corporate branding theory and states that because of this there is no accepted way of managing a corporate brand. However, one of three imperatives suggested for mangers of corporate brands is the co-construction of brand meanings. The corporate brand personality can be the method by which the corporate brand is communicated to the multiple stakeholders that are a key feature of the corporate as opposed to the product brand (Roper and Fill 2012).

<u>2.3 Brand Personality</u>

King (1970, p.14) states that *"people choose their brands the same way they choose their friends. In addition to the skills and physical characteristics, they simply like them as people"*. Within the energy sector there is increased interest in brands as anthropomorphic entitles and Clancy and O'Loughlin (2002) found that energy providers' brand personalities affect consumer aversion. The importance of brand personality within the context of service brands is acknowledged (Sirianni et al. 2013, Spielmann and Babin 2011), specifically its utility as a tool for positioning using Aaker's (1997) model of brand personality.

Aaker's (1997) seminal work considers the brand as if it were a person. This is otherwise known as anthropomorphisation (Patterson 2013). It involves attributing human characteristics to the brand, and is a way to create uniqueness by reinforcing those human psychological values to which consumers relate, beyond price, performance and functionality. Aaker (1997) determined five key brand personality dimensions: sincerity, excitement, competence, sophistication and ruggedness. In service organisations, where the core service is identical, developing and promoting a unique brand personality can become a key source of differentiation. Failure to do so would leave companies in a commodity market whereby the cheapest provider wins and in the case of the energy firms this would result in significant switching behaviour. Utilising the brand personality dimensions, Opoku (2007) constructed a

dictionary which enables researchers to analyse the brand personality being communicated through marketing text and allows direct comparison between brands over Aaker's five dimensions. Due to the homogenous nature of the energy industry, the development of a strong brand personality (Novak and Lyman 1998), is important to position and communicate information about the organisation to stakeholders.

Thomas and Jenifer (2016) consider brand personality from an employer brand personality perspective in the IT sector. Harris and Fleming (2005) study the banking sector and suggest that human personality traits should inform the service personality of the brand. A different cultural perspective is taken by Ahmed and Jan (2015), who extend Aaker's original work on brand personality by suggesting an Islamic brand personality scale. Ugolini, Cassia, and Vigolo (2014) consider the different gender associations within the personalities of service brands. Shehu et al. (2016) consider the impact of brand personality on non-profit organizations, namely charities, whilst Tsiotsou (2012) look at a specific area of the service sector, that is personality of sports teams.

Spielmann and Babin (2011) expand research into personality by looking at the importance of personality amongst several service industries and the personality of the industry itself rather than that of the individual brand name. Their work, however, relates to face-to-face high contact services. Our contribution is to look at the impact of brand personality and its impact on switching behaviour or customer loyalty on a low contact service.

de Chernatony and Segal-Horn (2003) comment upon the uniqueness of a particular service and the image that the service provider transmits with his/her behaviour can be a means by which service brands differentiate themselves. As with Spielmann and Babin (2011), however, their work looks at services where there is a significant interaction between

service provider and customer. Our work fills a gap in the literature by considering the importance of brand personality and brand consistency for an industry where there is little and often no interaction between service provider and customer.

2.4 Brand Personalities within the Big Six

The Big Six are increasingly turning to brand consultants when attempting to improve their proposition. For example, EDF engaged the marketing company Interbrand (Brownsell 2009), which developed a new "brand platform" to ensure clarity and consistency (EDF 2013). Interbrand (2012a) describe EDF's brand positioning as *"EDF [is] a committed, innovative brand with expert knowledge of the electricity business"*. This position, the company hopes, will be embodied within their new tagline of *"The Electricity Company"*.

British Gas, which is the largest of the Big Six, has taken significant steps to communicate a stable brand personality and initiated a brand identity re-launch (Chapman 2011). Significant resources appear to have been dedicated to this process, with the organisation creating the position of *"brand design manager"* describing the role as *"responsible for creative strategy and output in line with the brand personality"* (Brocklehurst 2013) and to ensure that *"all elements of our marketing deliver the company's strategy to be a modern, customer-led company"* (Chapman 2011).

Similarly, npower's brand manager has stated a desire to *"put the customer at the heart of the business"* (Brownsell 2013). In order to do that, npower need to "*earn the right*" to have a dialogue with customers. Whilst it is unlikely that consumers will come to love any of the Big Six, npower believes that it is possible for them to become *"trusted and respected"*. Ultimately, npower describes the challenge as moving from a situation in which *"you put your hands over the logo and you just cannot tell them [the Big Six] apart"*, to building a brand *"which has distinction [and] that is recognised for its own [brand] personality in the market."*

In essence, this approach recognises the power of brand identity when attempting to persuade consumers to switch providers. Rather than doing so simply on the basis of superior financial offers, the Big Six are increasingly looking to build a long-term brand personality with which consumers will identify.

Each of the Big Six has the same ultimate aim. As can be seen from the examples above, these organisations wish to be viewed as customer-focused and as offering a fair deal to consumers. However, attempts to differentiate their brands would be pointless if each brand personality being constructed by the Big Six was identical. Instead, there seem to be subtle but important differences in the ways that each company is choosing to communicate with its domestic audience. Further, an analysis of the language used in branding materials and outward-facing communications would reveal the different strategies being used by the Big Six in an attempt to achieve the same ultimate goals. As will be seen, however, each of the Big Six appears to be communicating their chosen brand personality differently. As we later demonstrate, some are more effective than others.

3. Theoretical Framework

A brand's personality is stronger and clearer if the dimensions are coordinated, if the personality is distinctive, and if the personality is consistent between channels and over time (Batra, Lehmann, and Singh 1993, Sung and Kim 2010). This research aims to analyse the different brand personalities constructed by energy brands and to link these to performance. This section, therefore, hypothesises relationships between the brand and consumer retention.

3.1 Brand Personality Strength

Branding within the energy sector is reliant on marketing communications which position the brand so that it occupies a distinct and valued position within consumers' minds

(Novak and Lyman 1998). Strong and distinctive brand communication may increase the level of consumer attention paid towards the brand, which in turn creates strong and more favourable brand associations (Freling and Forbes 2005). Previous studies identified that brands communicate certain dimensions more strongly than others (for example: *competence* in UK political parties (Rutter, Hanretty, and Lettice 2015)) and *ruggedness* in African tourism destinations (Pitt et al. 2007), and that brand personality strength and uniqueness is a key driver of performance (Freling and Forbes 2005). Brakus, Schmitt, and Zarantonello (2009) explain that particular dimensions of brand personality can increase loyalty and research has identified that consumers identify with particular dimensions of personality more than others and some dimensions are more relevant within specific sectors (for example, Ruggedness of African tourism destinations (Opoku and Hinson 2006), and Competence in politics (Rutter, Hanretty, and Lettice 2015)). Further, Sung and Kim (2010) provide evidence that brand personality traits, created in marketing communications, can be used as a central driver in enhancing persuasion. Therefore, our first hypothesis seeks to ascertain whether energy providers with different brand personalities have higher and lower levels of consumer switching.

First, Competence is the dimension most likely to be related to the sector (Sung and Kim 2010, Freling and Forbes 2013). Given the importance of an energy brand being Competent, we speculate higher levels of Competence will be associated with less switching. Second, Excitement is perceived more positively in line with persuasion attempts (Guèvremont and Grohmann 2013), in this case to retain a customer, and we speculate a link between higher levels of Excitement and less switching. Third, Ruggedness is a construct closely related to emotions (Viktoria Rampl and Kenning 2014), often perceived as more outdoorsy and tough; therefore, we speculate closer attachment and less switching. Therefore:

H1: Brand personality strength (of [a] Competence [b] Excitement [c] Ruggedness) will be significantly and negatively related to consumer switching.

Fourth, Sincerity is linked to trust in the brand, which represents honesty and reliability (Moorman, Deshpande, and Zaltman 1993). Given the nature of energy and an assumption of reliability, we propose that higher levels of Sincerity would not be linked to less switching. Fifth, Sophisticated brands are most likely to be associated with higher costs and exclusivity (Maehle, Otnes, and Supphellen 2011) and given the emphasis on the lowest cost tariffs being switched to, perceived higher price would be less desirable to consumers. Therefore:

H1: Brand personality strength (of [d] Sincerity [e] Sophistication) will be significantly and positively related to consumer switching.

3.2 Brand Personality Consistency

Global brands try to maintain brand consistency when communicating their brand qualities (Arruda 2009, Interbrand 2012b). This leads to consumer understanding of what the brand stands for, along with an ability to predict its future behaviour (Erdem and Swait 1998, Keller 1999, Lange and Dahlén 2003). Navarro-Bailon (2011) argues that brand consistency is integral to brand campaigns and Arruda (2009) states that brand communications should be consistent regardless of the media chosen. This consistency then results in higher levels of performance such as consumer-based brand equity (Pike 2010) over time and as part of the long-term strategy (Matthiesen and Phau 2005, de Chernatony and McDonald 2003, Argenti and Druckenmiller 2004, Knox and Bickerton 2003). Kapferer (2008, p.43) and Aaker (1996a) argue that brands can only be developed through "consistently being consistent" over a period of time. Consistency is essential for successful brands, but organisational complexity

and a lack of departmental commercial focus (Brookes 2003) can impact upon the level to which brands are able to communicate consistently (Chapleo 2007). This renders the energy sector context of particular interest when examining the relationship between brand consistency and performance. Therefore, our second hypothesis tests the relationship between brand personality consistency and consumer switching levels:

> **H2:** Brand personality consistency will be significantly and negatively related to consumer switching.

If a brand is are perceived as being less authentic, it can erode trust in that brand (Beverland 2009, Eggers et al. 2012). Institutions which have achieved a high level of brand authenticity are often less likely to over sell themselves (Interbrand 2012b). Grant (1999, p.98) stated that "authenticity is the benchmark, against which all brands are now judged". Eggers (2012) found that consistency and congruency were positively related to brand authenticity, whilst customer orientation was not. Becker (2009) also argues that if the image a brand is communicating is not congruent with reality, then it is not likely to be effective. Ergo, brands that are more authentic and consistent are more believable. A stakeholder approach to organisational identity infers that communication documents are contextualised and directed to different stakeholders groups (Roper and Davies 2007), perhaps at the expense of overall brand consistency. Therefore, the final hypothesis is:

> **H3:** Brand personality consistency (between internal and external communications) will be significantly and negatively related to consumer switching.

4. Methodology

The literature review highlighted growing anecdotal evidence to suggest the importance of a strong brand and personality as a means of differentiation within the energy

sector; therefore, this study was designed to empirically test these assertions and considers energy brands through a brand personality lens as well as the effect of communication on performance.

4.1 Sample

The Big Six energy providers were sampled, as they represent over 90% of all energy supplied in the UK consumer energy market. British Gas (20 million customers); EDF Energy (5.7 million customers); E.ON UK (5.3million customers); npower (6.5 million customers); Scottish Power (5.2 million customers); and SSE (9.6 million customers).

4.2 Variables

Energy brand performance was measured via a unique dataset of switching data covering the period of 2013-2015. This included the number of consumers switching divided by the total number of customers for each energy brand for each quarter over a 24-month period. This measures an energy brand's capacity to retain customers.

In this study, personality and communication consistency are key measures of brand. The UKRN's (UK Regulators Network) report, "Consumer Engagement and Switching" (2014) on behalf of Ofgem (Office of Gas and Electricity Markets) in the UK explained that the "internet tends to dominate" consumer switching decisions, particularly the provider websites, commonly used to access comparative information on alternative providers. Table 1 highlights that the Big Six providers averaged approximately 700,000 unique visitors per month in 2014, and these visitors spent an average of 7 minutes and 24 seconds reading the provider's website. Brand personality communicated by the company's website text provides a measure of brand personality strength.

[INSERT TABLE 1]

The brand personality communicated by the website text in 2013 compared with 2015 measures brand personality consistency over time and is consistent with the time period for the switching data available. The website provides information to consumers, delivering detailed information about the energy company and its product. The brand personality communicated by the website text in 2013 compared with the brand personality communicated by the annual report in 2013 measures brand personality consistency between communication channels. All energy companies produce an annual report, which provides details of the company's activities to stakeholders. The annual report of a company is a means by which to communicate the corporate brand to external stakeholders (Spear and Roper 2013, Roper and Fill 2012, Daglish 2016), but which must also resonate with internal stakeholders, otherwise it will fail to gain credibility (Dowling 2006, Heugens 2002). Table 2 summarises the variables used in this research.

[INSERT TABLE 2]

Brand consistency across channels was measured using t-tests. Each brand personality dimension over each medium was tested for significance of difference. If a brand personality dimension is significantly different between media, it is classed as inconsistent. Dimensions that were not significantly different were classed as consistent. For the purposes of this research, a non-significant difference demonstrates consistency, as opposed to numerical equality as constancy. Thus inconsistency is rejected at the *95%* or higher level ($p>0.05$). The example in Figure 1 highlights that Excitement, Competence, Sophistication and Ruggedness were consistent, whilst Sincerity was inconsistent.

[INSERT FIGURE 1]

4.3 Data Collection

Each energy company's website was downloaded, once in 2013 and again in 2015. Starting from the homepage, each website was initially "spidered" (an automated and methodical process to extract data from a website), which provided a list of URLs to be manually checked. Limitations in the methodology concerned data reliability (Krippendorff 2004) and checks were made to reduce bias. The researcher defined inclusion and exclusion criteria to ensure that the pages saved were related to residential customers and excluded contractual and policy pages, as detailed in Table 3.

[INSERT TABLE 3]

Two researchers were trained and then independently analysed and coded a selection of webpages and compared results. Discrepancies were discussed and resolved. Both researchers used the same instructions and criteria and the procedure was adjusted until high inter-coder reliability was obtained. Next, during the data collection stage, one trained researcher examined and made judgments about all webpages in the sample. Fifty per cent of the webpages were randomly selected and independently checked by a second researcher.

At the same time, each energy company's annual report was requested. Optical character recognition software then scanned the document to transfer the paper-based text to a digital format. This was able to convert 50-60% of the documents into a digital format. Each page of each document was then compared to the original text and the remaining 40% of data was entered manually. This process resulted in 4,002,878 words from the websites and reports for the six energy companies, shown in Table 4[a].

4.4 Content Analysis

The collected data were content analysed using Opoku's (2007) dictionary developed from Aaker's (1997) model of brand personality. Content analysis is a research technique to

objectively, systematically and quantitatively describe the content of communication. It has

been used before in research for marketing and branding (Kassarjian 1977, Berelson 1952);

specifically to analyse brand personality (Clemenz, Brettel, and Moeller 2012, Pitt et al. 2007,

Haarhoff and Kleyn 2012). Content analysis provides a powerful way to analyse marketing

communications, specially textual content of marketing media (Krippendorff 2004). The

Opoku dictionary, based on Aaker's brand personality framework, consists of five

dimensions: Sincerity, Excitement, Competence, Sophistication and Ruggedness, that are

used to assess brand personality from text-based media to produce frequency counts for the

number of brand personality words associated with each dimension. The dictionary also

included the dimensions, traits and facets themselves and an example of words associated

with each dimension can be seen in Table 4. This is a comprehensive and validated

dictionary that is able to test the brand personality dimensions contained within texts, as

opposed to most approaches to measuring brand personality which are aimed at identifying

how consumers perceive brand personality. It was therefore the approach most suited to the

aims of this research.

[INSERT TABLE 4]

The dictionary shifts the focus from how the consumers perceive brand personality, to

what the organizations as brands are saying about themselves. For example Table 5[a] shows

that British Gas communicated 1,000 words associated with Competence in their annual

report and 2399 and 874 words through their website in 2013 and 2015 respectively. Table

5[b] shows the relative frequencies, highlighting that British Gas's website was less wordy in

2015, therefore, the relative frequency of Competence was 31.31% and 25.7% in 2013 and

2015 respectively.

[INSERT TABLE 5]

Multiple Correspondence Analysis (MCA) was performed on the word counts, as although it is possible to identify certain distinctive patterns in Table 5, it is easier to understand, represent and interpret these patterns if they can be reduced to fewer dimensions and displayed visually (Andersen 1997, Brown and Suter 2012, Opoku, Abratt, and Pitt 2006). Therefore, a two-dimensional MCA was used to interpret the five dimensions of brand personality over a two dimensional axis (Hoffman and Franke 1986). Using two dimensions is appropriate given the high proportion of variance explained by the first two eigenvectors (*75.412 + 13.403% = 86.815%*). Furthermore, a multi-dimensional axis eliminates problems related to inter-spatial differences (Greenacre 2010, Hoffman and Franke 1986). Using MCA we were able to visually probe the relationship between brand personality strength and consistency.

The six energy brands' websites and annual reports in relation to the five brand personality dimensions were plotted in Figure 2 using two-dimensional correspondence analysis, which accounted for 86.8% of the total variance. The correspondence analysis explained percentages (eigenvalues) in variance of 75.4 % (0.052) for the first dimension and 13.4% (0.009) for the second dimension. Eigenvalues represent the linear transformation; the two-dimensions should be interpreted independently.

[INSERT FIGURE 2]

The data were checked for outliers using a box plot. The data were then tested for normality, linearity, homoscedasticity and independent errors. No assumptions were violated and no evidence suggested that the data were not suitable for further analyses (Field 2009) and the relationships between brand personality and consistency, and performance were

statistically analysed. The hypotheses were tested using multiple linear and moderation regressions.

5. Analysis and Findings

The first part of this section analyses the MCA and relationships between the dimensions and positions of the Big Six energy companies. The second section tests the statistical relationship between brand personality dimensional strength and performance. The third section tests the statistical relationship between consistency over time and between media, and performance. The final section content analyses the words used to form particular dimensions that the energy brands communicate strongly.

5.1 Brand Personality Positions

Figure 2 shows that the dimension *Sincerity* lies to the left of the correspondence plot. Conversely, the dimension *Ruggedness* lies to the right. Thus, we can interpret the horizontal axis as if it separates the more *sincere* from the more *rugged* energy brands. And we can interpret the vertical axis as if it measures the level of *excitement* and *sophistication*. Since the horizontal axis is the primary dimension, movement along this dimension represents the greatest variance, whilst the vertical axis represents a more subtle difference in a brand's personality.

The Correspondence Analysis Map in Figure 2 shows that: **British Gas** communicated a mixture of Competence, Sincerity and Excitement in 2013, however by 2015 had moved towards Excitement and Sophistication. Their annual report communicated Competence strongly. **EON Energy** communicated Competence strongly and consistently through their website (in 2013 and 2015) and through their annual report. **EDF Energy** communicated Excitement and Competence relatively consistently through their website (between 2013 and

2015) and annual report. **Npower** communicated Sincerity strongly through their website in 2013. In 2015 they were moving towards Excitement, whilst still communicating Sincerity strongly. Their annual report communicated Ruggedness strongly. **SSE** communicated Sincerity strongly through their website (in 2013 and 2015) and communicated a mixture of Competence and Ruggedness through their annual report. **Scottish Power** did not communicate a distinct personality in 2013, but moved to a more Competent, Sincere and Exciting personality in 2015. Their annual report communicated Competence and Ruggedness.

Visually, these findings indicate that the Big Six energy brands are indeed communicating varied brand personalities. It can clearly be seen that certain energy brands have communicated their personality consistently, whilst others seem to have repositioned themselves. The next section uses statistical analysis to relate the brand personalities to performance.

5.2 Brand Personalities and Performance

Multiple linear regression was used to test hypothesis 1. Brand personality Competence, Excitement, Sophistication, Ruggedness and Sincerity were regressed against switching. We have used switching, i.e. the number of customers a firm is losing to its competitors, as a proxy for firm performance. Indeed, in the electricity retail market, increasing the customer base (market power) is fundamental to the success of a firm.

[INSERT TABLE 6]

Brand personality explained a significant amount of the variance in switching $(R^2 = .727, p<.001)$. The analysis showed that Brand Personality Competence $(\beta = 1.430, p<.05)$, Excitement $(\beta = -1.578, p=<.001)$, Ruggedness $(\beta = -1.434, p<.001)$ and Sincerity $(\beta = .948,$

p<.001) contributed significantly, whilst Sophistication *(β = .332, ns)* did not. Therefore, hypotheses H1(b), H1(c) and H1(d) were supported, whilst hypotheses H1(a) and H1(e) were not. Brand personality Excitement and Ruggedness were negatively (less) associated with switching, whilst Competence and Sincerity were positively (more) associated with switching. In other words, brands that communicated Excitement and Ruggedness strongly and Competence and Sincerity weakly experienced the least switching and hence, the strongest performance. Table 6 provides a high level view of the two-year period and average brand personality strength, as communicated through the website.

5.3 Brand Personality Consistencies and Performance

The level of brand consistency over time significantly predicted consumer switching ($β= .232$, $R^2 = .658$, $p < .001$). Hypothesis H2 is therefore supported. Therefore, brands which had significantly changed their brand personality position or communicated inconsistently between 2013 and 2015 had more switching than those brands which remained consistent. The level of brand consistency between the website and annual report significantly predicted consumer switching ($β= .227$, $R^2 = .251$, $p < .001$). Hypothesis H3 is therefore supported. So brands which have a significantly different brand personality position between marketing communication channels had more switching than those brands which remained consistent.

To explain the positive relationship between brand consistency and switching, it cannot be assumed that the measured consistency (or lack thereof) is apparent to consumers. Specifically, it is reasonable to expect that the vast majority of consumers will not read both the annual reports and websites of any electricity provider. However, the minority of consumers who are switching may be those who are actively engaging with providers and seeking more information about them through these additional sources. Furthermore, it should

be stressed that the comparison of brand personalities reflected in annual reports and websites is a proxy for the brand consistency which may be reflected in a number of other communication avenues between the firms and their stakeholders. Finally, it can be argued that reports and websites are reviewed more thoroughly by organisations and individuals that act as public influencers such as comparison websites and consumer advice organisations.

5.4 Evidencing brand personalities

British Gas, as a former state owned utility, had a brand personality that was for many years based around its competencies, stability and lack of change (Parker 2003). Thus in 2013, its annual report predominantly concentrated on its competencies, particularly to *"ensure the successful implementation of [..] strategic priorities"* aiming to be an organisation *"leading the **industry"*** through *"ensuring continued safe, **reliable** operation"* through *"**strong** underlying economics and investment"*. Prior to 2013, at the height of the public's concerns over increasing prices, British Gas changed its visual identity for the first time in seventeen years (Chapman 2011). It began to stress that it was more customer focussed, a modern brand, and started to push its green credentials (visually, by adding green to its logo) and as a part of its personality. Thus whilst its website communicated Competence, it also communicated Sincerity and Excitement. Excerpts from their website explained the *"**competence** and **experience** of British Gas engineers"* as well the importance of *"having an **honest** conversation with customers, then acting on the feedback"* which included introducing an *"**exciting** new tariff [..] of 100% British renewable sources - at the same price as our Standard tariff"*. In 2014, a new marketing director was appointed (McCarthy 2014), charged with growing British Gas brand awareness. This has led the brand in the direction of excitement, with the 2015 website evolving to be less Competent and Sincere in favour of a more Exciting brand personality. The company explained it was

looking *"after customers' worlds everyday by providing [...]* **innovative** *energy solutions"* and offering *"the most* **exciting** *products on the market"*.

E.ON, having changed its name from Powergen in 2002, was arguably in the best position to craft its brand personality from scratch (Thomas 2003) for the UK market. E.ON Energy communicated Competence strongly and consistently through its marketing material. The annual statement explained the role of the executive board to *"regularly report on a timely and* **comprehensive** *basis on all relevant issues of strategy, planning, business development"* which pivots around the *"design of* **superior** *products and services for customers"*. The company wanted a *"***strong*** emphasis on working with employees"* to ensure all *"processes are* **complete** *and* **comprehensive**"*. Interestingly, E.ON (2008) has publicly announced that its brand is designed for "consumers to control their own experience […] to put across the personality behind E.ON", thus their website seemed concerned with explaining their long term, competent strategies and emphasised their *"***responsibility*** for* **securing** *access to long term gas storage projects in the UK"* and to *"***secure*** and deliver low carbon electricity"* through *"***award winning*** projects"*. Emphasis was also placed on *"enhancing employee skills and* **competence**"* to create *"responsible,* **competent** *leaders"* as well as products being *"independently* **certified** *to confirm that it meets Ofgem's"* standards.

EDF Energy was consistent between all media, whilst communicating Excitement strongly. EDF stress that their brand personality is "Positive Energy" and unchanged in three ways: that it is bold, optimistic and visionary (EDF 2013). In 2013, EDF introduced their blob-character Zingy to the UK, in an effort to help it stand out from the other five providers within the Big Six. Through their website, EDF explain how they *"***boost*** UK-wide carbon reduction efforts"* through *"***innovative*** energy solutions"* and *"***exciting innovative*** projects"*; for example *"newly opened* **state of the art**"* facilities emphasising *"energy through*

*sustainability [...] and **innovation** [which is of] vital importance in **energising** communities"*.

In 2014, EDF held regular workshops for its UK staff to help them keep its excitement-based personality strong across various media (EDF 2014). Given these efforts, it is perhaps unsurprising that EDF were the most consistent and exciting energy brand. Thus the annual statement appeared consistent with the website, albeit for a different audience, explaining how E.ON *"offers customers a full range of **state-of-the-art** integrated solutions"* through *"projects and the expansion and **modernization** of existing generation assets"*.

Since 2004, Scottish Power has elected to use an external branding agency. The mandate was to soften the firm's image (D8 2015) with greater focus on a more organic feel. In this regard, the website predominantly communicated Sincerity in 2013, with emphasis to *"ensure [customers] are paying the **correct** amount"* through ensuring that *"**actual** register readings [...] are validated"* and that *"operational procedures are **straightforward**, robust and transparent"*. In 2015, the website moved to a more Sincere, but also Competent position through emphasis on customisation *"easily, leading to a **superior**, more personalised service"* through the development of an *"**award winning** registration process that is tailored for every customer"*. Whilst Scottish Power's brand strategy was predominately concerned with "every single consumer touch point", the annual report communicated a mixture of Competence and Ruggedness with a mix of strategic information such as *"internal staff and external advisers working on the business plan; **strong** executive oversight; and a manager appointed to improve stakeholder engagement"*, also explaining the role of *"promoting a **robust** control[ed] environment"* of which they achieve a high level of *"detection of fraud and other **irregularities**"*.

Npower have manoeuvred their brand personality between 2013 and 2015. In 2013, it was reported that the company wished to promote "customer focused" and "consistent"

personality across all touch points, to earn the right from customers to "be trusted", moving away from their "low price" proposition (Brownsell 2013). Npower's annual report communicated ruggedness strongly, explaining *"**difficult** framework conditions"* and plants which have been *"especially **hard hit** by the rise in electricity from renewable"* and in response their *"goals of sustainable management becoming more **robust**"*. Thus in 2013, presumably to "earn trust" from customers, the website began communicating sincerity strongly, in order *"build sustainable **relationships**"* with customers, by providing a *"**warm** responsive service"*. Sometime after this, the company employed a brand consultancy to change the tone of the brand by utilising more "lifestyle" imagery and create a more "distinct personality" (CHSCreative 2014). Thus by 2015 the website appeared more exciting offering a competition and *"prizes for the most **spine-tingling** shriek of **excitement**"* as well as a fast *"5 minute check to see if you're [...] eligible for a **brand new** energy efficient boiler"* which offers to *"save energy and free up **vital** cash"*.

In 2014, SSE promoted the idea that consumers needed to look again at its offering and created a CGI (Computer Generated Imagery) "Orangutan", in a bid to *"reinstate consumers' faith and trust"* (Bold 2014) in the aftermath of price fixing scandals. Thus during 2013 and 2015, SSE communicated Sincerity strongly through their website. SSE explained that often competitors offer *"something [which] appears too **good** to be true [and] it often is"* whereas SSE *"offer **real** solutions"* which are *"simple, **straightforward** prices and products"* with *"guaranteed **standards** [to] ensure the highest levels of service"*. In contrast, but perhaps as part of SSE's wider strategy, the annual report communicated a mixture of Competence and Ruggedness. The report explained its *"**award winning** customer service"* at the *"**forefront** of industry development"*, being *"recognised as a **leader** in delivering high levels of customer service"*. SSE contextualised these competencies within an environment of *"economic conditions [which] are **tough**"*, referring to price hikes, explaining that *"days like*

*today are especially **difficult**"* and *"hard decisions [to make], particularly in the **difficult***

economic conditions".

6. Discussion, Managerial Implications and Conclusions

Despite the very significant political, economic and even cultural status of the Big Six, little research has been done into the ways in which these companies attempt to differentiate themselves. This is perhaps because, until recently, they have not needed to follow such a strategy in any coherent and consistent way. Under scrutiny from the public and politicians, however, the energy sector is changing rapidly. Branding within the energy sector has become increasingly important, as energy firms seek to attract and importantly retain customers. This study contributes to the branding literature in several ways.

<u>6.1 Brand Personality Strength</u>

Foremost, in a market otherwise characterised by isomorphism (Provance, Donnelly, and Carayannis 2011), this research highlighted the differing configurations of brand personality dimensions being used by energy sector companies and which dimensions of brand personality had greatest impact. Favourable brand personality has been demonstrated to increase consumer usage and preference towards a product or service (Freling and Forbes 2005, Sirgy 1982). Geuens (2004) explains that in markets where it is difficult to evaluate between different competitive offerings, such as for energy markets, the role of a strong brand position and communication becomes more important (Novak and Lyman 1998). In the age of multiple stakeholders, consumers want to know more about the company behind the products and services (Gyrd-Jones, Helm, and Munk 2013) and this is assisted by the corporate brand personality. However, our findings have shown that a strong brand personality alone is not

enough to prevent consumer switching, but rather that particular dimensions of personality are more favourable than others and that the relevance of specific personality traits can change:

Sincerity as a dimension of brand personality produced counterintuitive results in this study. Trustworthiness as a branding feature was previously identified by Ibáñez, Hartmann, and Calvo (2006) as one of the main drivers for customer loyalty in the Spanish residential electricity market, but our findings refute this conclusion for the UK market. Given that Sincerity is linked to trust in the brand, which represents honesty and reliability (Moorman, Deshpande, and Zaltman 1993), it was an underlying trait of most energy brands, but was associated with more switching. Aaker, Fournier, and Brasel (2004), found that in transgression situations, relationships with sincere brands suffer the most. It is possible that due to the negative media coverage of UK energy companies that consumers do not believe the energy companies' projection of the brand personality dimension of sincerity.

Excitement is an underlying dimension of energy brand personalities, and when it appeared more prominently, as a primary or secondary dimension, the lowest levels of switching were observed. Our findings support previous findings, for example of that by Swaminathan, Stilley, and Ahluwalia (2009) which highlight consumer preference for Exciting brands when making high avoidance decisions. Guèvremont and Grohmann (2013), found that excitement is also perceived more positively in line with persuasion attempts. Aaker, Fournier, and Brasel (2004) identified consumers being more likely to overlook transgressions (for example, problems in service or billing) of exciting brands and that these transgressions may even reinvigorate a relationship once a problem has been resolved (as part of an "intimate" relationship). Our research demonstrates that it is not only the more dynamic consumer brands that are able to benefit from projecting a more exciting personality.

Ruggedness it emerged was linked to lower consumer switching behaviour, and was linked strongly with an energy brand's green credentials. Hartmann and Apaolaza-Ibáñez (2012) highlight the benefits of green branding strategies in attracting and retaining consumers and Hanimann, Vinterbäck, and Mark-Herbert (2015) identified green branding to be positively related to consumer demand. However, our findings can only offer limited support for this within the UK market, as no energy brands communicated Ruggedness strongly through their website and only npower highlighted their green credentials in their annual report.

Competence was another dimension that led to counterintuitive findings in this study. Increased levels of Competence (and to a lesser extent, Sincerity) were associated with more consumers switching, which led to a decrease in market share. Given that Competence was the dimension most likely to be related to the sector (Sung and Kim 2010, Freling and Forbes 2013) it may be that, as Beverland and Farrelly (2010) explain, consumers pursue authentic products, that is, those perceived as genuine, real and true. In line with Beverland and Farrelly's findings, it could be that consumers expect competence from their energy company, they take it for granted and thus overtly communicating these dimensions to consumers may be subject to a level of cynicism and therefore viewed as inauthentic.

Sophistication was the least communicated dimension and was not significant. Given that Sophisticated brands are most likely to be associated with higher costs and exclusivity (Maehle, Otnes, and Supphellen 2011), perceived higher price does not tend to fit the mainstream energy market.

6.2 Brand Personality Consistency

The findings of this research have highlighted the importance of consistency between media communications. The corporate brand covers the entire company and a covenant

between a company and its major stakeholder groups is at the core of the corporate brand (Argenti and Druckenmiller 2004, Balmer 2001, Balmer, Harris, and de Chernatony 2001). de Chernatony and Segal-Horn (2003) explain that successful service brands are able to communicate a clear brand position consistently to all major stakeholders. This research demonstrates that annual reports often communicated higher levels of Competence (in terms of achievement) and Ruggedness (in terms of green credentials) than other media, often at the expense of consistency. The importance of image in annual reports has been noted in previous research (Patricia, John, and Guil 2004) and was noted as particularly useful when countering negative information. The findings of this study highlight Competence was used in conjunction with reporting negative information (for example: significant price hikes and missing renewable targets) and findings highlight that these deviations were often at the expense of brand personality consistency, communicated via their websites. EDF stood out as particularly successful, being able to communicate a position of Excitement strongly and consistently, while at the same time communicating an increased amount of Competence in its annual report.

Our findings have demonstrated that consistent brands performed better as they achieved higher consumer retention than their inconsistent counterparts. Aaker (1996b), explains the advantages of a consistent brand position over time as being able to achieve communication efficiencies to contribute to owning a position in the minds of consumers. Aaker (1996b), suggests that brands are under increasing pressure to change position if short-term performance targets are not met. Our findings indicate that energy brands, particularly npower and Scottish Energy, made significant changes to their brand personality, which coincided with press releases in regard to changes in their strategy, but they suffered higher levels of switching and a subsequent reduction in market share.

In summary, in addition to responding to the call for empirical evidence into links between brand and loyalty in liberalised residential energy markets, this research provides a theoretical contribution to branding and marketing research within the energy sector by exploring and linking brand personality and consistency to performance. The study has been achieved through the application of new combinations of tools and analyses to measure brand personality and consistency within the energy context. Using these tools, researchers and managers are able to analyse the brand personality communicated via marketing channels, as well as to measure consistency between channels and over time.

6.3 Managerial Implications

Energy managers are aware of the importance of their image and brand. One needs to look no further than EDF's online "Brand Centre" to appreciate how seriously the Big Six are taking their brand development (EDF 2013). With separate sections for both external and internal stakeholders, companies such as EDF are now determined to ensure that their branding efforts coalesce into a repeated message to consumers. That message plays an important role in forging the brand personality of the company. The kind of brand-focused thinking which in the past has been confined to forward-looking companies such as Apple, is now becoming an integral part of corporate strategy more widely. Nonetheless, some of the energy brands still struggle to carve out an identity for themselves and the findings of this research provide three clear managerial and practical implications.

First, there is an ideal brand personality for the UK energy sector. Low to medium levels of Sincerity and Competence and high levels of Excitement and Ruggedness communicated through the website lead to better performance. The annual report should maintain this, but also communicate a higher level of Competence. Energy sector brand

managers should review their communications and ensure that they are using the right language to portray their brand personality to their customers.

Second, brand personality consistency over time is important. Energy sector brands should not drastically change their branding each year. If change is deemed necessary, incremental changes should be introduced. Managers should detect and correct potential inconsistencies in their branding by regularly reviewing their external communications.

Finally, brand personality consistency between the website and the annual report was identified as a predictor of performance. Interestingly, the majority of brands were inconsistent on this measure. Relatively quick gains could be made by energy sector brand managers by reviewing external communications for consistency of language and message. Our findings highlight that brand personality should be consistent between these media, but greater emphasis needs to be placed on Competence related language, particularly when delivering negative information.

6.4 Conclusions

This research has extended the current understanding of brands and brand personality into the energy sector. Previous research has tended to focus on pricing, but since privatisation of the UK energy sector, increasing focus has been placed on marketing and branding. By focusing on energy sector companies brand communication through their websites and annual reports, we examined what brand personality dimensions are communicated most strongly and how consistently each organisation communicates its brand between the website and annual report. We then assessed the organisation's performance, measured by consumer loyalty or switching behaviour. We find that brand personality does have an impact on customer retention. First, brands communicating Excitement more strongly have the lowest levels of switching. Second, brands with more consistent brand

personalities have lower levels of switching. Brand managers should therefore consider how

to increase the communication of Excitement in relation to their brands without being

inauthentic and they need to ensure that their brand is consistent over time and between

different marketing media. This research has used an innovative measure of performance -

consumer switching. Future studies could utilise other performance data, such as green

credentials, sustainability levels, price comparison data, profitability data or performance on

complaints. This study is based in the UK and considers brand personality strength, brand

personality consistency and performance for the UK Big Six energy providers. The results

may not therefore be generalizable to other countries and organizational contexts. It would be

useful to extend this research to energy providers in other countries to investigate the extent to

which the entire sector is embracing branding and brand personality. This research focuses

on the textual marketing communications of the energy providers in the sample and does not

consider other aspects that contribute to brand personality consistency such as logo, graphics,

colour, shapes and layout of communications. The study focuses on what the brand is

communicating about itself via its annual report and website, and not on what consumers

perceive the brand personality to be from these channels. Consumer perception of the brand

personality and its consistency across other media is therefore another interesting and useful

area for further research.

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Table 1: Big Six website statistics (average per month in 2014) (source: Alexa)

Energy Provider	URL	Unique Hits per Month	Average time on site
British Gas	britishgas.co.uk	1,400,000	8m 2s
E.ON UK	eonenergy.com	830,000	6m 7s
EDF Energy	edfenergy.com	700,000	7m 47s
RWE npower	npower.com	580,000	8m
SSE	sse.co.uk	120,000	5m 18s
Scottish Power	scottishpower.co.uk	580,000	10m 9s

Table 2: Variables

Variable	Description and Measure
Brand Personality	Brand personality strength measured by the relative frequency of references to each of the 5 dimensions of brand personality.
Brand Consistency	Measured through an assessment of whether or not the 5 dimensions of brand personality are significantly different (see figure 4) between channels: (1) Consistency between the website in 2013 and 2015; (2) Consistency between the website and annual report in 2013
Switching	The number of customers switching as a proportion of the total number of customers (churn) for each energy provider.

Table 3: Criteria used for the data collection process

Sections to be saved	Sections not to be saved
• Homepage • About the company • Gas and electricity information • Home services information • Research information • News and events	• Any link that goes away from the main URL • Customer account based pages (login, meter reading etc.) • Business related pages • Terms and Conditions (contractual, privacy policy, access, legal, etc.) • Contact information • Procedural and help information • Tariff and price information • Technical specifications

Table 4: Selected words from Opoku's brand personality dictionary

Trait	Selected words
Competence	*Competent, guarantee, responsible, staunch, unshakable*
Sincerity	*Authentic, affable, down-to-earth, heartfelt, realistic*
Sophistication	*Celebrated, charismatic, distinguished, graceful*
Ruggedness	*Challenge, endeavour, rigorous, tough, unrestrained*
Excitement	*Bold, courageous, fresh, inventive, stirring*

Table 5[a]: Brand personality frequency counts and total number of words

		Competence	Excitement	Ruggedness	Sincerity	Sophistication	Total Words
Annual Report	British Gas	1000	429	193	547	36	113,311
	E.ON UK	281	93	33	103	10	110,939
	EDF Energy	530	468	98	402	36	29,968
	RWE npower	388	332	116	416	20	99,650
	SSE	266	176	44	181	8	112,047
	Scottish Power	891	359	163	511	68	40,396
Website (2013)	British Gas	2399	1422	467	3194	180	426,198
	E.ON UK	1727	827	189	2090	88	322,756
	EDF Energy	2140	1113	680	2482	181	343,842
	RWE npower	652	557	98	2266	55	165,035
	SSE	834	494	132	1547	74	183,160
	Scottish Power	722	293	33	1114	7	90,323
Website (2015)	British Gas	874	513	173	1651	184	223,020
	E.ON UK	2609	1053	318	3081	79	541,484
	EDF Energy	1824	1307	465	2078	132	472,060
	RWE npower	1649	1774	314	5939	255	507,180
	SSE	685	427	95	1298	65	155,577
	Scottish Power	264	185	35	356	4	65,932
						Total	4,002,878
						Mean	222,382

Table 5[b]: Brand personality proportions and of total words

		Competence	Excitement	Ruggedness	Sincerity	Sophistication	% of total words
Annual Report	British Gas	45.35%	19.46%	8.75%	24.81%	1.63%	1.95%
	E.ON UK	54.04%	17.88%	6.35%	19.81%	1.92%	0.47%
	EDF Energy	34.55%	30.51%	6.39%	26.21%	2.35%	5.12%
	RWE npower	30.50%	26.10%	9.12%	32.70%	1.57%	1.28%
	SSE	39.41%	26.07%	6.52%	26.81%	1.19%	0.60%
	Scottish Power	44.73%	18.02%	8.18%	25.65%	3.41%	4.93%
Website (2013)	British Gas	31.31%	18.56%	6.10%	41.69%	2.35%	1.80%
	E.ON UK	35.09%	16.81%	3.84%	42.47%	1.79%	1.52%
	EDF Energy	32.44%	16.87%	10.31%	37.63%	2.74%	1.92%
	RWE npower	17.98%	15.35%	2.70%	62.45%	1.52%	2.20%
	SSE	27.07%	16.04%	4.29%	50.21%	2.40%	1.68%
	Scottish Power	33.28%	13.51%	1.52%	51.36%	0.32%	2.40%
Website (2015)	British Gas	25.74%	15.11%	5.10%	48.63%	5.42%	1.52%
	E.ON UK	36.54%	14.75%	4.45%	43.15%	1.11%	1.32%
	EDF Energy	31.42%	22.51%	8.01%	35.79%	2.27%	1.23%
	RWE npower	16.60%	17.86%	3.16%	59.80%	2.57%	1.96%
	SSE	26.66%	16.61%	3.70%	50.50%	2.53%	1.65%
	Scottish Power	31.26%	21.91%	4.14%	42.21%	0.47%	1.28%

Table 6: Market share change (account volume) and average website dimension strengths (ranked)

	MS	Competence	Excitement	Ruggedness	Sincerity	Sophistication
EDF Energy	1	3	1	1	6	2
Scottish Power	2	2	2	6	3	6
British Gas	3	4	3	2	4	1
E.ON UK	4	1	6	3	5	5
SSE	5	5	5	4	2	3
RWE npower	6	6	4	5	1	4

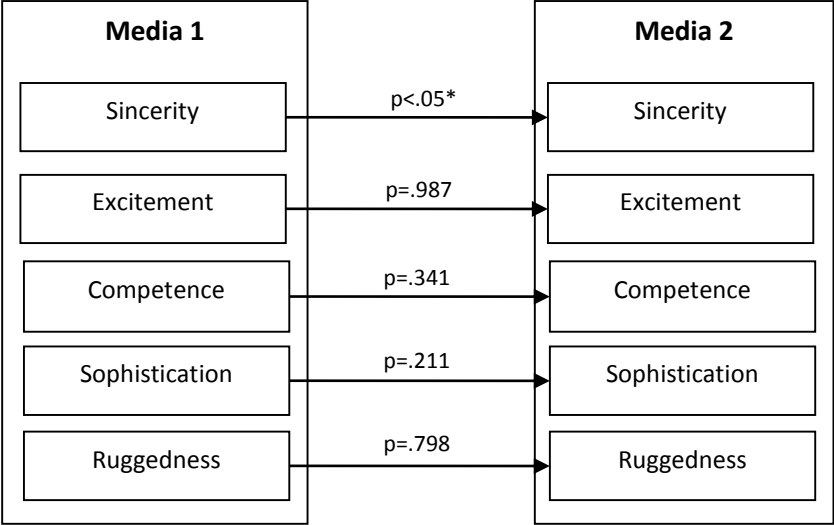**Figure 1:** t-tests conducted between each dimension of each channel

Figure 2: Correspondence map of brand personality of the Big Six brands in 2013 (web and annual statement) and 2015 (web)